

Organization Charts (Org Charts)

Policy

It is the policy of the DGS that each division/branch/section/office submit to the Office of Human Resources (OHR) Personnel Operations Section, Classification and Pay Unit, a signed and dated organization (org) chart on an annual basis and whenever there is any proposed change(s) in the organizational structure, which generally occurs at the time a Request for Personnel Action (RPA) is submitted. The org chart shall be drawn in accordance with the guidelines provided in this section.

Topic	See Page
Policy	0
General	1
Org Chart Design	2

General

Definition and/or explanation

Org charts provide an overview of the department or organizational unit and a ready reference to each position's placement within the organization. The org charts depict the reporting relationship between positions and provide a basis for understanding the various levels of supervision and distribution of responsibilities.

Org charts are used to show the intended structure of an organization. Org charts typically are pyramidal in shape and show the person in charge at the top. Clustered below them are their subordinates. Individuals shown on the same horizontal level in the organization chart are perceived to be "peers" within the organization.

Positions in DGS have been approved and classified based on the work assigned **and** their reporting relationship to other positions within the department. For that reason, how DGS organizes (or reorganizes) may influence not just one position, but several.

When to update and submit a chart

Org charts are updated:

- on an annual basis, which must include the Office/Division chief's signature (**hard copy by the 10th of July**) (**this deadline CANNOT be extended for any reason**)
- monthly to your assigned C&P Analyst (**no later than the 10th of each month**) (electronically)
NOTE: C&P Analyst shall provide a hard copy of org chart to OHR management no later than the 10th of each month.
- quarterly (January, April, July, October): a hard copy of each DGS office org chart is to be provided to the manager in charge of this activity by the C&P Analyst
- required whenever the following changes occur, generally submitted through the RPA process:
 - To fill a vacant position (current only)
 - To fill a new position (current and proposed)
 - To reclassify a position (current and proposed)
 - To transfer an employee and/or a position to another unit/location (current and proposed)
 - Reorganization of structure (current and proposed)

WARNING!

BEFORE making **any** personnel changes, realignments or reorganizations they must be reviewed and approved by DGS OHR.

Continued on next page 90.1

Org Chart Design

Introduction VISIO 2003 is the authorized software of the DGS and all org charts shall be submitted using this software. (Contact the Office of Information Technology-OTR if an upgrade to your computer is required.)

The org chart should be sufficiently clear so that someone unfamiliar with the organization can easily understand its structure. The chart shows the DGS' positions, which positions report to each supervisor and the work unit(s) for which each supervisor has responsibility.

For a small organization, the entire structure may fit on a single page. For a large organization, the operating department may prepare one comprehensive, general chart showing each major unit and the top managerial/supervisory position for each such unit and to attach additional charts showing each of these units.

Format All org charts shall be submitted in the format as discussed in this section.

Chart Format

Org charts shall:

- Be on 8 ½ x 11 white paper
- Be in landscape
- Depict the title, office/branch/section/unit, and date in the upper left hand corner (month and year only)
- Depict the signature block in the lower right hand corner
- Not use color
- Not use shading
- Not use shadowing
- Not use italic font
- Use Arial for all text
- Depict all positions, including vacancies and "loaned" positions to or from another division or department; **however do not include reference to IDL, WC, or LEAP. RA ONLY for retired annuitant in budgeted positions**
- Use correct connectors when depicting reporting relationship (dotted lines may be used for Special Consultant positions or for reporting relationships outside the unit but functionally reside within the unit)

Position Format

Each position shall reflect the following information in the order presented:

- Employee's name or VACANT
- Civil service title, not working title, in CAPS
- Position number, in full
- Tenure and time base, if less than permanent-full time

Continued on next page 90.2

General, Continued

Training

To assist you in complying with the org chart design and format, we recommend that all employees who are responsible for creating the org chart participate in the following courses:

Microsoft Visio 2003 Professional

The courses are available online through New Horizons. You will access the training website at <http://knowledge.newhorizons.com/>. After logging in, type in the word “visio” in the search box and enter; this will open up the available courses for Visio or you can register for the course at <http://www.training.dts.ca.gov/>.

Suggestion

To make the creation of org charts simple, we recommend that you create an Excel spreadsheet, which contains, at a minimum, the following columns:

- Name (first, middle initial, last)
- Supervised by
- CLASS TITLE
- Position number

From the spreadsheet you can then use the Organization Chart Wizard and it will draw the org chart for you, including the connector lines.

Continued on next page

General, Continued

Resources The following table depicts the resources available.

RESOURCE	SECTION
Administrative Orders http://msd.dgs.ca.gov/AO.htm	AO 04-06
Classification and Pay (C&P) Guide	320.2
Responsible Control Agency and/or Program	Office of Human Resources (OHR), Personnel Operations Unit
Other:	
VISIO 2003 Professional Manual	Received at training with Health & Human Services Agency Data Center (HHSDC) http://www.training.dts.ca.gov/

Attachment You may access an example of a correct org chart by following this link
<http://www.documents.dgs.ca.gov/ohr/pom/Visio-c-p org chart.pdf>